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ABSTRACT
This workbook of checklists is Attachment 2 to the document "Preparing Knowledge Linking Change Agents in Education: A Materials and Training Development Project," see ED 056 257, and should accompany Attachment 1, "A Guide to Innovation in Education." The nine checklists in the workbook are as follows: (1) Over-all Management of a Change Project; (2) Preliminary Self-Assessment and Role Definition; (3) Who Is the Client?; (4) Linkage to the Client: How Good Is Your Relationship?; (5) Diagnosis of the Client's Problem; (6) Awareness and Retrieval of Information Resources; (7) Choosing the Solution; (8) Gaining Acceptance; and (9) Insuring Continuance. (For related documents, see ED 056 257, 258, and 259.) (CK)

ED 056 256

A WORKBOOK OF CHECKLISTS TO ACCOMPANY A GUIDE TO INNOVATION

by Ronald G. Havelock

Introduction

A change agent is usually a man of action who has little time for exhaustive self analysis and documentation. Even so, he may need to give himself a few guideposts to mark progress in his relationship to his client and his client's progress toward a desirable goal. The GUIDE describes each step of the process in some detail but many readers have asked for a little more instrumental help in some sort of workbook format.

Unfortunately our project did not provide adequate support for a full cycle of development, field test, and evaluation of such a workbook. Therefore, the reader should be advised to take what follows as the barest outline of how such a workbook device might work in practice. If a reader wishes to use any of these lists, he should feel free to adapt them, copy them, reorder them, select from them, according to his needs. There are probably far too many items on these lists to be realistically monitored in a small project. Checklist #6, for example, asks the change agent to indicate what sources of information he searched out. The point, however, is not to search out each source but to be aware of and consider using a variety of sources. Each list, therefore, should be considered first as a reminder of the contents of the GUIDE, second as an alerting mechanism to aspects of the process of change one might have overlooked, and only third as a monitoring device to keep track of a project.

If readers do use any of these instruments for any purpose, the author would be grateful for feedback on their utility and on ways they could be developed into meaningful tools in the management of change.

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INNOVATION GUIDE CHECKLIST #1

OVER-ALL MANAGEMENT OF A CHANGE PROJECT

[Based on Havelock's GUIDE TO INNOVATION IN EDUCATION]

Steps in Change Planning (with relevant GUIDE sections indicated)	Not important or relevant for this project	Have given this thought	Procedure for doing this established	Fully or adequately developed
1. I have defined a role or function for myself in this project. (Introduction)				
2. A client system has been defined and delimited. (Stage I)				
3. A good starting relationship has been established between the change agent(s) and the client system. (Stage I)				
4. The change agent(s) have acquired adequate information to diagnose the client problem. (Stage III B-1, p. 84-91)				
5. An adequate definition and diagnosis of the problem has been made. (Stage II)				
6. An adequate range of solution-relevant resource sources have been tapped. (Stage III)				
7. An adequate range of solution alternatives have been developed. (Stage IV)				
8. An appropriate solution idea has been selected and adapted. (Stage IV)				
9. The solution idea has received endorsement in principle from key members of the client system. (Stage V)				
10. The solution idea has been adequately demonstrated to the client system as a whole. (Stage V)				
11. A maintenance process for the innovation has been established. (Stage VI)				
12. A self-renewal process for the area related to this innovation has been established. (Stage VI)				
13. The client-change agent relationship has been successfully terminated. (Stage VI)				

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INNOVATION GUIDE CHECKLIST #2

PRELIMINARY SELF-ASSESSMENT AND ROLE DEFINITION

[GUIDE Introduction, pp. 1-16]

1. The Primary Change Role you follow: (see Introduction to GUIDE for some alternative role models):

	Good	Adequate	Needs Improvement
Training and experience for role.			
Formal status in this role.			
Informal social support and recognition in this role.			
Feeling of personal competence in this role.			
Feeling of personal security in this role.			
What other change agent roles do you adopt at times:			
Over-all feeling of competence in this role.			

2. Organizing the Change Team

Other persons you know who might work in change agent roles with respect to this client system:

	Outsiders	Insiders	Estimate of need for this type of change agent in this project. (Circle)
as Catalysts			Lo Med Hi
as Process Helpers			Lo Med Hi
as Solution Givers			Lo Med Hi
as Resource Linkers			Lo Med Hi

Of those listed in the boxes above star (*) those that might be potential collaborators. Double star (**) those who defintely will be contacted for possible collaboration.

Checklist #2, continued

Who are the members of the change team?

	Person	Primary Skills or Contribution to Project
Insiders		
Outsiders		

How good is the linkage and collaboration within the team? _____

Do you confer frequently? _____

Do you share goals and values? _____

Do you have a common plan? _____

Do you divide up the labor rationally according to your skills? _____

3. Process Knowledge and Skill (Check as appropriate)

Stages	This is an especially important Stage in this project	I have the requisite knowledge and skill	I can call on the right kind of help for this	We have a definite plan for this	This Stage now worked through	I still must work on this	Needed action by me
I. Building Relationships							
II. Diagnosing Problem							
III. Acquiring Relevant Resources							
IV. Choosing Solution							
V. Gaining Acceptance							
VI. Stabilizing Innovation & Generating Self-Renewal							

Checklist #2, continued

Which stage of planned change is most crucial in this project? _____

Why? _____

_____

Do you or your team have the process skills and knowledge relevant to this stage?

_____

_____

On what stage are your knowledge and skills weakest? _____

_____

How do you intend to work to improve your knowledge and skills on this?

_____

_____

INNOVATION GUIDE CHECKLIST #3

[GUIDE Stage I, pp. 39-44]

WHO IS THE CLIENT?

1. Retrieving Information on Who the Client is:

Initial Contact Pe son: _____

Did he or she: represent anyone more than themselves? _____
provide leads to other client system members? _____
outline who they define as client system? _____
Do you agree with this definition? _____

Who can provide the best thumbnail sketch of the client system with an anthropologist's eye?

_____

Have you contacted this person? _____

2. Boundaries: (a) Who is your primary client? _____

(b) What other persons and groups form the relevant social environment of your primary client?

_____

_____

3. Norms: What are the dominant norms and values of the client system?

_____

_____

PRIMARY CLIENT: Rate them relative to other clients you have known with respect to:

	extremely	somewhat	neither or some of both	somewhat	extremely	
Politically: Liberal						Conservative
Socially: Innovative						Non-Innovative
Technologically: Innovative						Non-Innovative
Cohesive						Factional
Externally Oriented (Cosmopolite)						Internally Oriented (Localite)
Science Oriented						Tradition Oriented
Generally similar to you in norms and values						Generally different from you in norms and values
Other important norms _____						Other important norms: _____
_____						_____

Checklist #3, continued

LARGER SYSTEM (Client's Social Environment)

	extremely	somewhat	neither or some of both	somewhat	extremely	
Politically: Liberal						Conservative
Socially: Innovative						Non-Innovative
Technologically: Innovative						Non-Innovative
Cohesive						Factional
Externally Oriented (Cosmopolite)						Internally Oriented (Localite)
Science Oriented						Tradition Oriented
Generally <u>similar</u> to you in norms and values						Generally <u>different</u> from you in norms and values
Other important norms: _____ _____						Other important norms: _____ _____

4. <u>Leadership</u>:

Estimate and circle the prevailing attitude of each leader on these topics. (DK = Don't Know, + = positive, N = Neutral, — = negative).

Name, Position	Orientation to Change in General	Orientation to you	Orientation to the Innovation	Contacts to you (Pl = planned)
Formal Leaders of the Primary Client Group:				
1. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
2. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
3. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
Informal Leaders of Primary Client Group:				
1. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
2. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
3. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl

Checklist #3, continued

Name, Position	Orientation to Change in General	Orientation to you	Orientation to the Innovation	Contacts to you (Pl = planned)
Formal Leaders of Larger System:				
1. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
2. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
3. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
Informal Leaders (Influentials):				
1. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
2. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
3. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
Gatekeepers:				
1. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
2. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl
3. _____	DK + N —	DK + N —	DK + N —	Yes/No/Pl

5. Summary:

Do you have enough information to define the client system adequately? _____

Have you defined the client adequately? _____ On paper? _____

Have you assessed the relative importance of work with the larger system? _____

INNOVATION GUIDE CHECKLIST #4

LINKAGE TO THE CLIENT: HOW GOOD IS YOUR RELATIONSHIP?

[GUIDE Stage I, pp. 44-58]

1. Beginning Status: Where did you start?

(a) blank slate _____ → If so, has client had previous exposure to similar agents or similar projects? _____

(b) reestablishing a good relationship _____ → If so, has anything changed? _____ is there room for improvement? _____ is there potential for erroneous expectations? _____

(c) reestablishing an uncertain relationship _____ → If so, why did the relationship have problems? _____ have these been corrected? _____

(d) redefining a relationship _____ → If so, does the client know the relationship is different? _____ in what ways does your new role interfere with your old? _____

2. Inside-Outside:

How do you rate yourself on this dimension?

	Mostly an outsider	More outsider than insider	More insider than outsider	Mostly insider
As you see yourself				
As you think you are seen by clients				

Have you built a change team with both inside and outside members?

List and rate team members:

Checklist #4, continued

3. How Nearly Does the Relationship between Your Change Team and the Client System Approach the Ideal?

	Early Stages			Middle Stages			Later Stages		
	Lo	Med	Hi	Lo	Med	Hi	Lo	Med	Hi
Reciprocity: give and take on both sides →									
Open to new ideas:									
the change team is: →									
the primary client is: →									
other members of client system are: →									
Realistic expectations:									
the change team has: →									
the client has: →									
Expectations of reward:									
by change team for selves: →									
by change team for client: →									
by client for client: →									
Structure:									
roles defined: →									
work procedures specified: →									
expected outcomes specified: →									
Degree of power equality:									
change agents vs. primary client →									
Perceptions of threat to selves by:									
change team: →									
client system: →									
Frank confrontations and talking out of differences:									
within the change team: →									
within the client system: →									
between change team and clients:									
Involvement of:									
formal leaders (key administrators): →									
informal opinion leaders: →									
representative users: →									
teachers: →									
students: →									
parents: →									
community groups: →									

INNOVATION GUIDE CHECKLIST #5

DIAGNOSIS OF THE CLIENT'S PROBLEM

[GUIDE Stage III, pp. 59-75]

1. Definition

   a. How does the client initially define the problem?

   b. How do you initially define the problem?

   c. Are there important differences between 'a' and 'b'?

2. Interpretation

   a. Do you have any hypotheses about underlying causes?

   b. What evidence can you cite for these hypotheses?

3. Opportunities

   a. What are some client system strong points indicative of potential for growth or change?

Checklist #5, continued

4. Diagnostic Inventory

	CLIENT SYSTEM in General			CHANGE PROJECT in Particular		
	Yes	?	No	Yes	?	No
a. *What are the goals?* (If possible, list goals of client system and of change project separately on a separate sheet.)						
(1) Are goals clear to leaders?						
Are goals clear to members?						
(2) Is there consensus on goals?						
(3) Are members satisfied with goals?						
(4) Have leaders and members sat down together to discuss goals openly?						
(5) Are goals flexible?						
b. *Is there an adequate structure for achieving goals?* In general →						
(1) Adequate division of labor?						
(2) Job and role clarity?						
(3) Do jobs and roles fit together?						
(4) Are some necessary elements missing: specify for client system_____						
specify for change project_____						
(5) Are there weak elements? specify for client system_____						
specify for change project_____						
(6) Overloaded elements? specify for client system_____						
specify for change project_____						
(7) Under-used elements? specify for client system_____						
specify for change project_____						
(8) Are existing elements adequately coordinated						
(9) Is the structure flexible?						
c. *Is there openness in communication?*						
(1) Are leaders able to express their ...*ideas* openly?						
...*feelings* openly?						
(2) Are teachers able to express their ...*ideas* openly?						
...*feelings* openly?						

[Continued on next page]

Checklist #5, continued

	CLIENT SYSTEM in General			CHANGE PROJECT in Particular		
	Yes	?	No	Yes	?	No
(3) Are students able to express their ...*ideas* openly?						
...*feelings openly?*						
(4) Are members open to new ideas *from within* the client system?						
(5) Are members open to new ideas *from outside* the client system?						
d. *Are the necessary capacities available?*						
(1) Adequate resources in *people?* specify lacks for client system_____						
specify lacks for change project_____						
(2) Adequate resources in time?						
(3) Adequate resources in money?						
(4) Adequate resources in materials and facilities? specify lacks for client system_____						
specify lacks for change project_____						
(5) Does staff have necessary skills?						
Adequate procedures for training?						
Ability to recruit the right people?						
e. *Are adequate rewards provided?*						
(1) Are the students rewarded: ...for learning?						
...for contributing to the learning process?						
(2) Are the teachers rewarded: ...for innovating?						
...for learning?						
...for contributing to the learning process?						
...for working collaboratively with students and administrators to keep the system going and to improve the system?						
(3) Are the administrators rewarded: ...for innovating?						
...for learning?						
...for being open to students and teachers?						
(4) Are the rewards that people get reliable and predictable?						

[Continued on next page]

Checklist #5, continued

	CLIENT SYSTEM in General			CHANGE PROJECT in Particular		
	Yes	?	No	Yes	?	No
(5) Do the rewards that people get come soon enough to be associated with their behavior?						
(6) Are the rewards required by individuals and subgroups compatible with and supportive of the over-all goals of the system?						

5. Pitfall Analysis

	Definite Danger	Possible Danger	No Danger
a. Too much diagnosis →			
b. Diagnosis as a pattern of avoidance →			
c. Diagnosis used for destructive confrontation			
d. Imposing your own favorate diagnosis →			
e. Fire fighting →			
f. Other: _____ →			

INNOVATION GUIDE CHECKLIST #6

AWARENESS AND RETRIEVAL OF INFORMATION RESOURCES

[GUIDE Stage III, pp. 77-83 and 91-103 - and Appendix B and C]

1. Have you considered the task of acquiring appropriate information resources? _____
2. Have you read through "Stage III" of the GUIDE? _____
3. Have you scanned the different sections of Appendix B (Major Information Sources)? _____
4. Have you evolved an information acquisition strategy? _____
5. Have you viewed Information Resources in relation to the full cycle of problem solving? _____

Seven Major Purposes of Resource Acquisition (GUIDE p. 78-81)	I have thought about this aspect	I have awareness of IR's* on this aspect	I have acquired IR's* on this aspect	Briefly list IR's* acquired	I have adequate grasp of this aspect
Diagnosis					
Awareness					
Trial					
Evaluation-after-Trial					
Installation					
Maintenance					

*[IR = Information Resources]

Checklist #6, continued

6. Access to Information Source Types

	List:	Not aware of any source of this type	This type of source not relevant	This type of source not accessible	This type of source is accessible: Not Used Yet	This type of source is accessible: Used
PRINT SOURCE TYPES						
Major Texts or Reviews of the Subject Area of this Innovation						
Newsletters:						
Information Services ERIC: OTHER:						
Libraries						
Directories & Indices						
Reference Books						
Other Print Sources						

Checklist #6, continued

	List:	Not aware of any source of this type	This type of source not relevant	This type of source not accessible	This type of source is accessible: Not Used Yet	This type of source is accessible: Used
PERSON SOURCE TYPES						
Consulting Organizations						
Individual Consultants						
Academic Institutions						
Individual Professors, Scholars, & Researchers						
Federal Government Agencies						
Professional Associations						
Other School Systems						
Other Individuals in my School System						

7. Have you used an adequate variety of resources? _____

8. Have you spent enough time searching for resources? _____

9. Have you spent enough time reading, listening to, or observing the resources you have acquired? _____

INNOVATION GUIDE CHECKLIST #7

CHOOSING THE SOLUTION

[GUIDE Stage IV, pp. 105-120]

1. *Have you been able to identify some research findings relevant to the change project?*

	Relevant to:			
	the client and context	the manifest problem	the underlying cause(s)	the change process
No search made				
Search made: no findings				
Findings identified and collected				
Findings summarized				
Implications discussed by change team				
Implications discussed with client system				
Implications listed				

List of Implications from Research Findings: Relevant to:

1. _____ _____
2. _____ _____
3. _____ _____
4. _____ _____
5. _____ _____
6. _____ _____
7. _____ _____
8. _____ _____
9. _____ _____
10. _____ _____

Checklist #7, continued

2. *Have you generated a range of solutions and solution ideas?*

a. Have you tapped an adequate number of idea sources?

	Not Relevant	Relevant but not solicited	No Ideas	Ideas Heard	Ideas listed	Ideas summarized	Ideas synthesized
(1) from research							
(2) from change team brainstorming							
(3) from brainstorming with clients							
(4) from outside experts							
(5) from students							
(6) from teachers							
(7) from community							

b. What are the major alternatives for action? (List)

(1) _____

_____

_____

(2) _____

_____

_____

(3) _____

_____

_____

(4) _____

_____

_____

Checklist #7, continued

3. *Feasibility Testing: Listing, Analysis, and Rating*

LISTING OF CONSEQUENCES	ALTERNATIVES		
	#1	#2	#3
a. Benefits: Short term			
b. Benefits: Long term			
c. Costs (financial and human): Short term			
d. Costs (financial and human): Long term			
e. Diffusibility Problems forseen			
f. Other Potential Problems forseen			

Checklist #7, continued

3. *Feasibility Testing (continued)*

Alternative Rating Modes
[Rank order: "1-5" scale or use "Hi"-"Med"-"Lo"]

Analysis and Rating Dimensions	Original Alternatives				Revised, Combined, Adapted Alternatives		
	1	2	3	4	1	2	3
a. Potential BENEFIT							
(1) Number of people helped							
(2) How long it will help							
(3) How much will it help on diagnosed problem							
(4) How much positive side effects							
(5) Negative effects if it works							
(6) Negative effects if it fails to work							
(7) Over-all benefit							
b. WORKABILITY							
(1) Evidence that the innovation will deliver as hoped							
(2) Evidence of reliability of performance							
(3) The client can afford financial cost							
(a) for trial							
(b) for initial purchase & installation							
(c) for maintenance over long haul							
(4) The client can afford the human investment and cost							
(a) for trial							
(b) for initial purchase & installation							
(c) for maintenance over long haul							
(5) There is a good cost-to-benefit ratio							
(6) Client has the necessary staff							
(7) Innovation is adequately developed (see GUIDE p. 118 "2f")							
(8) Over-all workability							
c. DIFFUSIBILITY							
(1) Congruent with client values							
(2) Can be demonstrated easily-conveniently							
(3) Can be tried out by client on limited basis							
(4) Adequately packaged and labelled							
(5) Over-all diffusibility							

Checklist #7, continued

4. *Adaptation*

Is a trial phase planned? _____

Is a trial component of the proposed change going to be tested before the whole program is tried? _____

Is a trial group within the client system going to try out the change before all of the system tries? _____

Will there be evaluation of the trial effort? _____

Will the proposed change be seriously reconsidered after results of trial are in? _____

Will efforts be made to change the innovation as a result of trial experiences? (e.g., adding more elements, better packaging, combining, eliminating elements.) _____

Will more than one innovation idea be tried out? _____

Will they be tried out in such a way that their impact can be compared? _____

INNOVATION GUIDE CHECKLIST #8

GAINING ACCEPTANCE

[GUIDE Stage V, pp. 121-148]

1. Preparation

a. Have you developed a plan for gaining acceptance? _____

b. Has the plan been specified in activities? _____
...persons to be contacted? _____
...steps in sequence? _____

c. Has the plan been shared, critiqued, and revised by all the members of the change team? _____

d. Does the plan take adequate account of the norms, values, characteristics of the client system? _____

e. Do you have ways to evaluate the success of your strategy as it goes along? _____

f. Will you be able to alter your strategy if it is not working? _____

g. What specific steps have you taken to prepare for the following?

(1) Promotion (to build awareness)

(2) Informing (to build interest and to satisfy information seeking)

(3) Demonstration (to allow pre-trial evaluation)

(4) Training (to help insure successful trial and adoption)

(5) Servicing (to help adoption and integration)

(6) Nurturing, consulting, and psychological support (to help integration)

Checklist #8, continued

2. Progress Record

		WHERE THEY ARE AT:					
		Awareness	Interest	Evaluation (indicate +/−)	Trial	Adoption	Integration
Key Members ("Stepping Stones") of the Client System	Innovators						
	Resistors						
	Formal Leaders Administrators Elected Officials						
	Informal Leaders of Opinion in the Community...						
	...in the schools						
	The School Staff as a Whole						
	Community as a Whole						

Checklist #8, continued

3. Diagnosing the Forces For and Against the Innovation

	FORCES FAVORING		FORCES OPPOSING	
	List	Rank of Importance	List	Rank of Importance
Characteristics of the Innovation				
Norms				
Key People				
Other Factors				

What can be done to reduce, redirect or eliminate the impact of the most important *opposing* forces?

What can be done to enhance and/or maximize use of the *favoring* forces?

INNOVATION GUIDE CHECKLIST #9

INSURING CONTINUANCE

[GUIDE Stage VI, pp. 150-153]

1. Rewards Continuing Over Time

For Whom	What rewards	How much	How constant over time	How visible over time
Administration				
Teachers and Staff				
Students				
Community				

2. Practice and Routinization

   a. Has a continuing program of in-service training relevant to the innovation been instituted? _____

   b. Are new users continuing to be introduced to the innovation? _____

   c. Are users given a chance to practice on their own without heavy surveillance and risk of public censure? _____

   d. Do users now accept the innovation as a regular part of their work? _____

3. Structural Integration

   a. Is the innovation now accepted as a regular part of the school budget? _____

   b. Have schedules been rearranged permanently to make provision for the innovation? _____

   c. Have staff and student work loads been adjusted to make way for the innovation? _____

   d. Has there been official recognition that the innovation is here to stay? _____

Checklist #9, continued

4. Continuing Evaluation

   a. Has a continuing evaluation procedure been instituted? _____

   b. Is there adequate budget for evaluation? _____

   c. Are there staff on board with adequate skills for continuing evaluation? _____

   d. Is evaluation recognized and accepted by users as necessary and useful? _____

   e. Are evaluations read and attended to by users? _____
      administrators? _____

   f. Is evaluation fed back to the developers of the innovation to improve its long term effectiveness? _____

5. Maintenance

   a. Are relevant materials (if any) and other consumable supplies maintained at adequate levels? _____

   b. Is related equipment (if any) kept in good repair? _____

   c. Are users regularly given help and advice when they encounter difficulties? _____

   d. Is feedback from evaluation used regularly to help users improve their utilizations? _____

6. Continuing Adaptation Capability

   a. Are users able to adapt the innovation to fit their special circumstances? _____

   b. Is feedback from evaluation and from users (staff or students) used to reshape the innovation? _____

   c. Is adoption of the innovation regularly reviewed to see if it is still the most suitable and effective product or practice of its type available? _____